

Performance Management/CPI RFQ # GS10F12LPQ0001  
ATTACHMENT (C2)  
**SAMPLE TASK ORDER**  
**DATED: 6-26-2012**  
FEDERAL GOVERNMENT  
AGENCY X  
PERFORMANCE WORK STATEMENT (PWS)  
FOR  
PERFORMANCE MANAGEMENT/CONTINUOUS PROCESS IMPROVEMENT  
(PM/CPI) SUPPORT

### 1.0 Purpose

The Federal Government, Agency X, requires Performance Management/Continuous Process Improvement (PM/CPI) support services to enable achievement of its mission and vision.

### 2.0 Background

The Federal Government, Agency X, has a vision of excellence in the business of government, delivering service, innovation, and value. The Agency X's mission is to provide best-value services, products, and solutions to customers that will increase overall government effectiveness and efficiency. To accomplish this mission Agency X serves Federal, State & local government and the military and offers volume discount prices on over 11 million commercial products and services from thousands of industry partners, using cost-effective procurement vehicles. The current Agency X workforce consists of over 4,000 professionals.

The Agency X Strategy Management Office (SMO) is an integrator office, whose purpose is to help define the strategic vision and goals for Agency X and provide support in attaining those goals. The mission of the SMO is to serve as the internal consultant for innovative business methodologies that impact results and drive behavior by connecting the individual to the goals of the organization. The SMO responsibilities include developing and deploying an Agency X wide PM/CPI program.

Launched in 2010, the SMO's PM/CPI program is beginning to deliver business results for Agency X, including approximately \$1M/year Return on Investment (ROI), development of streamlined processes, and improved customer satisfaction. With a team of three employees (one director and two PM/CPI experienced analysts), the program requires significant contractor support to expand the breadth and depth of its deployment across Agency X.

### 3.0 Scope

The scope of the work under this Task Order is to provide PM/CPI services as defined in Tasks below on a Labor Hour (LH) basis in support of the Agency X PM/CPI program. It is estimated that a total of **20,000 labor hours** will be required to accomplish the **LH requirements** of this

Task Order (task numbers 1 through 5) for a one year period. The **training task** number 6 shall be performed on a **Firm Fixed Price (FFP)** basis.

#### **4.0 Tasks**

The work under this task order will include program management, strategic planning, program start-up and support, and change management services covered under the Blanket Purchase Agreement (BPA) for PM/CPI services.

#### **4.1 Task 1 – Provide Program Management (LH)**

The contractor shall provide program management support under this task order. This includes the management and oversight of all activities performed by contractor personnel, including any subcontractors and Contractor Teaming Arrangement (CTA) teaming partners, to satisfy the requirements identified in this performance work statement (PWS). The contractor shall identify a Program/Project Manager (PM) by name who shall provide management, direction, administration, quality assurance, and leadership for the execution of this task order.

##### **4.1.1 Subtask 1 – Coordinate a Project Kickoff Meeting (LH)**

The contractor shall schedule and coordinate a Project Kick-Off Meeting at the location approved by the Government. The meeting will provide an introduction between the contractor personnel and Government personnel who will be involved with the task order. The meeting will provide the opportunity to discuss technical, management, and security issues, and reporting procedures. At a minimum, the attendees shall include key contractor personnel, representatives from the directorates, other key Government personnel, and the contracting officer's representative (COR). The contractor shall provide the following at the kickoff meeting:

- Project Management Plan
- Final Quality Control Plan

##### **4.1.2 Subtask 2 – Prepare a Monthly Status Report (MSR) (LH)**

The contractor PM shall develop and provide an MSR using Microsoft (MS) Office Suite applications, by the 10th of each month via electronic mail to the COR. The report shall include the following:

- Activities during reporting period, by task (include: on-going activities, new activities, activities completed; progress to date on all above mentioned activities). Start each section with a brief description of the task.
- Problems and corrective actions taken. Also include issues or concerns and proposed resolutions to address them.
- Personnel gains, losses, and status (security clearance, etc.).
- Government actions required.

- Schedule (show major tasks, milestones, and deliverables; planned and actual start and completion dates for each).
- Accumulated invoiced cost for each CLIN up to the previous month.
- Projected cost of each CLIN for the current month.

#### **4.1.3 Subtask 3 – Convene Status Meetings (LH)**

The contractor PM shall convene a weekly Contract Activity and Status Meeting with the COR, and other key government stakeholders. The purpose of this meeting is to ensure all stakeholders are informed of the weekly activity and status of on-going tasks, provide opportunities to identify other activities and establish priorities, and coordinate resolution of identified problems or opportunities. The contractor PM shall provide a presentation at the meeting that includes dashboards outlining project deliverables, status updates and burn rates.

#### **4.1.4 Subtask 4 – Prepare a Project Management Plan (PMP) (LH)**

The contractor shall document all support requirements in a PMP. The PMP shall:

- Describe the proposed management approach.
- Contain detailed Standard Operating Procedures (SOPs) for all tasks.
- Include milestones, tasks, and subtasks required in this TO.
- Provide for an overall Work Breakdown Structure (WBS) and associated responsibilities and partnerships between Government organizations.
- Include the contractor's Quality Control Plan (QCP) (if applicable).

The contractor shall provide the Government with a draft PMP on which the Government will make comments. The final PMP shall incorporate the Government's comments.

#### **4.1.5 Subtask 5 – Implement Transition-out Plan (LH)**

The contractor shall implement its Transition-Out Plan no later than 90 calendar days prior to expiration of the TO.

### **4.2 Task 2 – Transition-Out (LH)**

The Transition-Out Plan shall facilitate the accomplishment of a seamless transition from the incumbent to an incoming contractor/Government personnel at the expiration of the TO. The contractor shall provide a Transition-Out Plan no later than (NLT) 90 calendar days prior to expiration of the TO. The contractor shall identify how it will coordinate with the incoming contractor and/or Government personnel to transfer knowledge regarding the following:

- Project management processes
- Points of contact
- Location of technical and project management documentation
- Status of ongoing technical initiatives
- Appropriate contractor to contractor coordination to ensure a seamless transition.
- Transition of Key Personnel

- Identify schedules and milestones
- Identify actions required of the Government.
- Establish and maintain effective communication with the incoming contractor/Government personnel for the period of the transition via weekly status meetings.

#### **4.3 Task 3 - Strategic Planning (LH)**

The contractor shall assist in the development of a PM/CPI strategic plan, its presentation to Agency X leadership, and once approved, its implementation. At a minimum, the contractor shall assist the government in addressing the following elements:

- Program objectives and strategies to accomplish such objectives
- Project portfolio management to ensure an optimum mix of projects are selected, prioritized, planned and executed within the planning timeframe of one year
- Program evaluation and measurement to ensure the program is on track to accomplish its objectives

#### **4.4 Task 4 - Program Start-up and Support (LH)**

The contractor shall provide support to the Agency X PM/CPI program and transitioning from its initial stages of deployment to a more mature program with a significant Agency X wide impact. At a minimum, the contractor shall accomplish the following:

- Develop and implement an effective certification program that will enable Agency X to self sustain PM/CPI capability across the enterprise within three years of its implementation
- Support the execution of 4 high priority, complex PM/CPI projects
- Coach and mentor PM/CPI students who are working Lean Six Sigma (LSS) projects at various levels of complexity: 40 yellow belt, 20 green belt, and 8 black belt
- Create a mechanism that includes establishment of a PM/CPI Leadership Board and quarterly facilitation sessions to enable Agency X organizations to share PM/CPI best practices and replicate project results as appropriate

#### **4.5 Task 5 - Change Management (LH)**

The contractor shall assist in developing and executing a change management strategy that supports the transformation of Agency X towards an organization that practices PM/CPI in its day to day operations. At a minimum, the contractor shall address the following elements:

- Governance structure to ensure the strategic alignment, proper resourcing, and Agency X leadership support of PM/CPI initiatives
- Strategic communications that promote workforce awareness, understanding, and engagement in PM/CPI initiatives
- Strategies to promote collaboration among Agency X organizations to accelerate the pace of change towards a PM/CPI culture

#### **4.6 Task 6 - Training Support (FFP)**

The contractor shall provide training support to the Agency X PM/CPI program by conducting Lean Six Sigma (LSS) training classes. The contractor shall provide a minimum of one instructor for the Yellow and Green Belt classes and a minimum of two instructors for the Black Belt classes. The government will provide the course materials, and classroom for the training. At a minimum, the contractor shall accomplish the following:

- Schedule and conduct eight (8), one day, LSS Yellow Belt level training classes for 20 students each class
- Schedule and conduct four (4), one week, LSS Green Belt level training classes for 20 students each class
- Schedule and conduct two (2), five week (nonconsecutive), LSS Black Belt level training classes for 20 students each class
- Provide lessons learned and course material feedback following completion of each of the LSS training classes

#### **5.0 Period of Performance**

The period of performance shall be one year.

#### **6.0 Performance Location:**

The work associated with the resultant task order will take place in the Washington, DC Metropolitan area at the contractor's site. The government will provide a classroom for Task 6, Training Support.

#### **7.0 Program Manager**

The contractor shall identify a Program Manager to serve as the Government's key point-of-contact and to provide overall leadership and guidance for all contractor personnel assigned to the task order. The contractor's Program Manager is ultimately responsible for performance on this task order. This person shall be readily available to respond to Government questions, concerns, and comments, as well as be proactive in alerting the Government to potential contractual or programmatic issues.

#### **8.0 Deliverables**

TO Section	Deliverable	Quantity	Timeframe
4.1.1	Project Kickoff Meeting	1	Not later than 10 days after award
4.1.1	Project Management Plan	1	Draft at kickoff meeting
4.1.1	Final Quality Control Plan	1	At kickoff meeting

4.1.2	Monthly Status Report	12	10 <sup>th</sup> calendar day of each month
4.1.3	Weekly Status Meeting	52	Read ahead provided by close of business day before meeting
4.1.4	Project Management Plan	1	Final within 15 days after receipt of government comments. Updates provided as changes occur.
4.2	Transition Out Plan	1	90 calendar days prior to task order expiration
4.3	PM/CPI Strategic Plan	1	60 calendar days after award
4.4	Certification Program Plan	1	60 calendar days after award
4.4	High priority, complex PM/CPI project support	4	Support provided throughout the performance period
4.4	Candidate coaching and mentoring	40 YB 20 GB 8 BB	Support provided throughout performance period
4.4	PM/CPI Leadership Board facilitation	4	Completion one year after award
4.5	Change Management Strategy	1	60 calendar days after award
4.6	LSS Yellow Belt (YB) training	8 classes	Completion one year after award
4.6	LSS Green Belt (GB) training	4 classes	Completion one year after award
4.6	LSS Black Belt (BB) training	2 classes	Completion one year after award
4.6	Lessons Learned and Feedback	1 report per course	3 calendar days after each class completion